

Roadmap to Running a Capital Campaign

The goal of this project was to help the head of school in running a large capital campaign for his or her school. The final product was to be a decision tree that would allow the school head to follow a step-by-step process in implementing the specific campaign.

The decision tree was built by talking to professional fundraisers and Van Lunen consultants (see specific names in the report) as well as discussion with other Van Lunen fellows who had been through this process. The final product was also tested by my own experience of conducting a campaign over the past year.

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Van Lunen Project 2008

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By Gene Frost, Head of School, Wheaton Academy

Dr. Bruce Lockerbie, long-time Christian educator and president of PAIDEIA inc. explains that the school head in the 21st century can no longer be just the educational leader. Rather, the head of school must also provide business and entrepreneurial leadership such as a corporate CEO would. In my short experience as head of school at Wheaton Academy I have certainly found this to be true and of all the leadership challenges I have faced, none has been bigger than the challenge of running a multi-million dollar capital campaign.

In choosing a practical project for my Van Lunen fellowship I thought that sharing what I have learned these past two years in both research and conducting a major capital campaign might be helpful to other heads of school. In order to be as practical as possible I have constructed a decision tree that I had to follow as I conducted our recent campaign. It is hoped that by following this decision tree a head of school will have a road map to conducting a capital campaign. Where a school may not have the in-house expertise on their staff or board I have encouraged the use of consultants. Consultant help was invaluable in our conducting of a campaign. I would encourage anyone running a major capital campaign not to skip any steps and to secure outside help when needed.

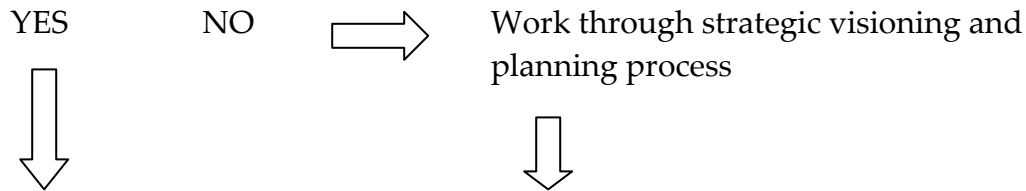
These steps were distilled from Wheaton Academy's experience working with the *Timothy Group* of Grand Rapids along with the feedback of *Van Lunen consultants Bill Hausman and Alan Zacharias*, as well as the experience and feedback of several Van Lunen fellows.

It is my sincere hope that this decision tree will be helpful to many schools in their desire to raise the financial support for running the excellent Christian school God has called us each to lead.

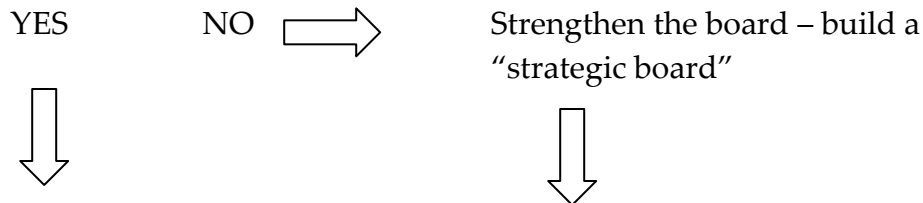
SO YOU NEED TO RAISE BIG MONEY?

13 STEPS TO CONDUCTING A SUCCESSFUL CAPITAL CAMPAIGN

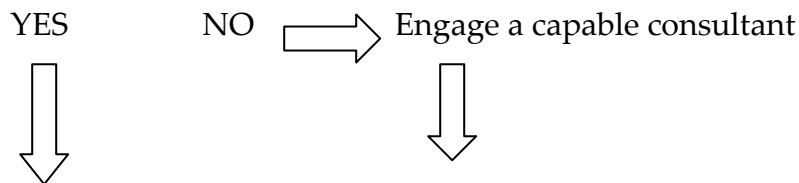
I. Have clear mission and vision for your school and a strategic plan which includes the rationale for a campaign



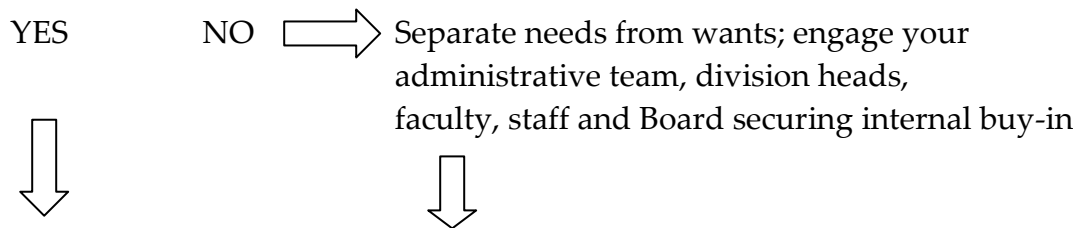
II. Have Board leadership capable of approving, publically supporting, and executing the campaign



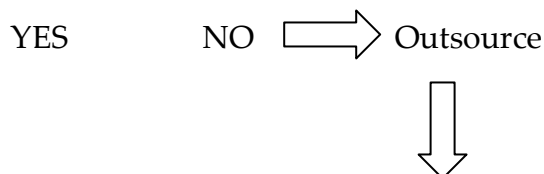
III. Have an effective development staff which has already executed a successful campaign



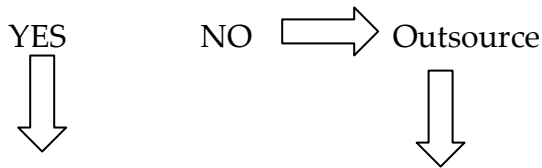
IV. Identify specific items that need funding to support the mission – operations, capital, endowment



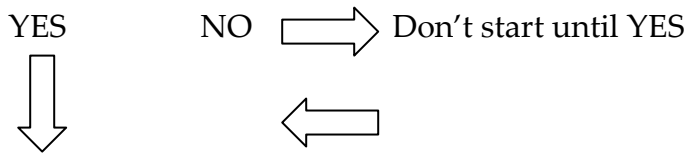
V. Develop case statement based on the campaign’s importance to the strategic plan and highlight the appeal to the potential supporters



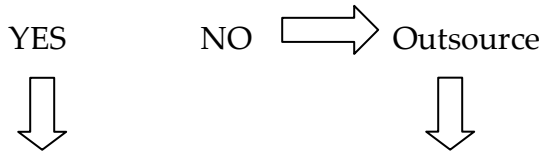
VI. Have the capability to run a pre-campaign study



VII. Establish realistic goals (Law of 1/3) – You should plan on gifts from no more than 1/3 of your prospects at each level



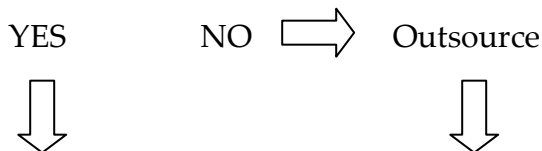
VIII. Have a plan for the campaign (see committee structure below)



Standing committees:

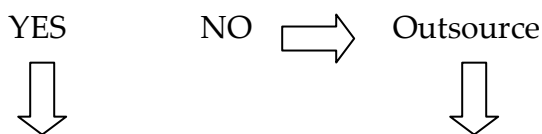
- Major gifts
- Events
- Prayer
- Alumni
- Planned gifts
- Communication

IX. Execute Silent Phase – raise 60-70% of ultimate goal by going to key givers before the public announcement

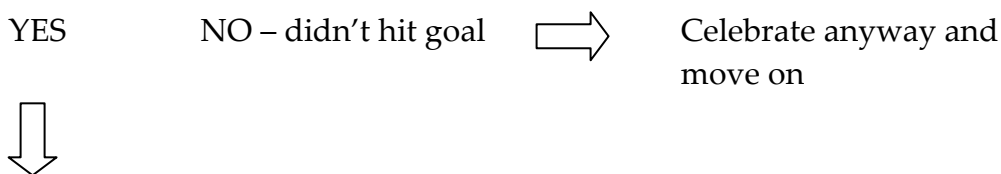


Build a giving pyramid
Start top down and inside out
(closest to the organization first)
Recognition/networking

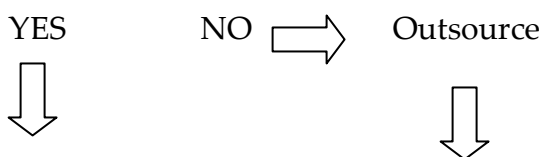
X. Execute Public Phase – raise remaining money in a targeted time period



XI. Celebrate hitting campaign goal



XII. Do post-campaign assessment



XIII. Transition back to annual fund (or next campaign)

A personal word about Wheaton Academy’s current capital campaign:

Wheaton Academy’s experience included the use of the Timothy Group from Grand Rapids, MI. They were able to walk us through the planning, pre-campaign study and did the search for our excellent new head of development, Mrs. Nikki Daniels. Once these three tasks were done the Timothy Group stepped aside as we’ve conducted the silent and public phases of the campaign titled “Transforming Every Student.” Our campaign goal is \$12.8M. Following our public launch October 30, 2007 we had \$7M in gifts and pledges and we now (June 30, 2008) have approximately 75% of our goal or \$9.7M. It is hoped that the remaining \$3M will be raised by this time next year to coincide with the dedication of the new field house. In any case we will be inviting the Timothy Group back in to do an evaluation with our major donors. We are pleased with the help and the results we have received. In the words of our school motto, “Soli Deo Gloria,” to God be the glory alone.